**Marketing and Sales Process**

**Business Lead Generation Process**

The Presales Conultant will do all the Levels except for Level 5 . which is mainly done by either Account Manager or Sales Representative

**The Data are tracked and Converted in the CRM**

1. The Lists are Converted into Leads
2. Leads are converted into Prospects
3. Prospects are converted into Opportunity
4. Oppertunities are Converted into Customers

**There is a Qualifying Criteria for Conversions**

1. Leads - decision maker is Identified
2. Prospects - they have a possible requirement , have a budget
3. Opportunity - the Budget is identified , Customer is willing to Explore a Solution with the company
4. Sale - Account Paid and Contract Signed

**Reports**

Reporting is very important Milestones will be set and reviewed .We will have Report Formats which will have details like

**Produductivity Info** like number of calls made Emails Send , number ofProspects Rate of Conversion

**Accounting Info** like identified budget Project cost etc.

**Forecasts :** how many Oppertunities expected to be piped Sales Expected

**Targets :** Expected & Achieved

1. **Weekly Report**
2. **Monthly Report**
3. **Quaterly Report**
4. **Annual Report**

The Presales Consultant will prepare **the QBR ( Quaterly Business Review )** in which

The Roadmap for the three months will be presented and interviwed

**Organisational Structure**

The Organisation is very much Flat . but for work flow reasons we have the following structure

Presales Consultant will be Working on a daily Basis with Sale Consultant or Account Executive and they will be reporting their Respective Managers ( Presales Consultant will report to Presales Manager Similarly Sales consultant will report to Sales Manager) The Presales also need a Tech Contact in order to clarify and answer some of the tech queries

**Some of the Tools required**

1. CRM
2. Document Sharing System
3. File Sharing
4. Computer Tracker
5. Telecom Equpment

**Quantifiable Targets**

he Presales Consultant is performance driven so the milestones will be set accordign to.

1. **Number of Warm Transfers**
2. **Oppertunities Piped**
3. **Total Budget Piped**
4. **Sales Resulting from the Pipeline**